



Creating Customer Service Training for the Academic Library

Access Services Conference
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Who we are



Barker Library
Dewey Library
Hayden Library

Library Storage Annex
Lewis Music Library
Rotch Library





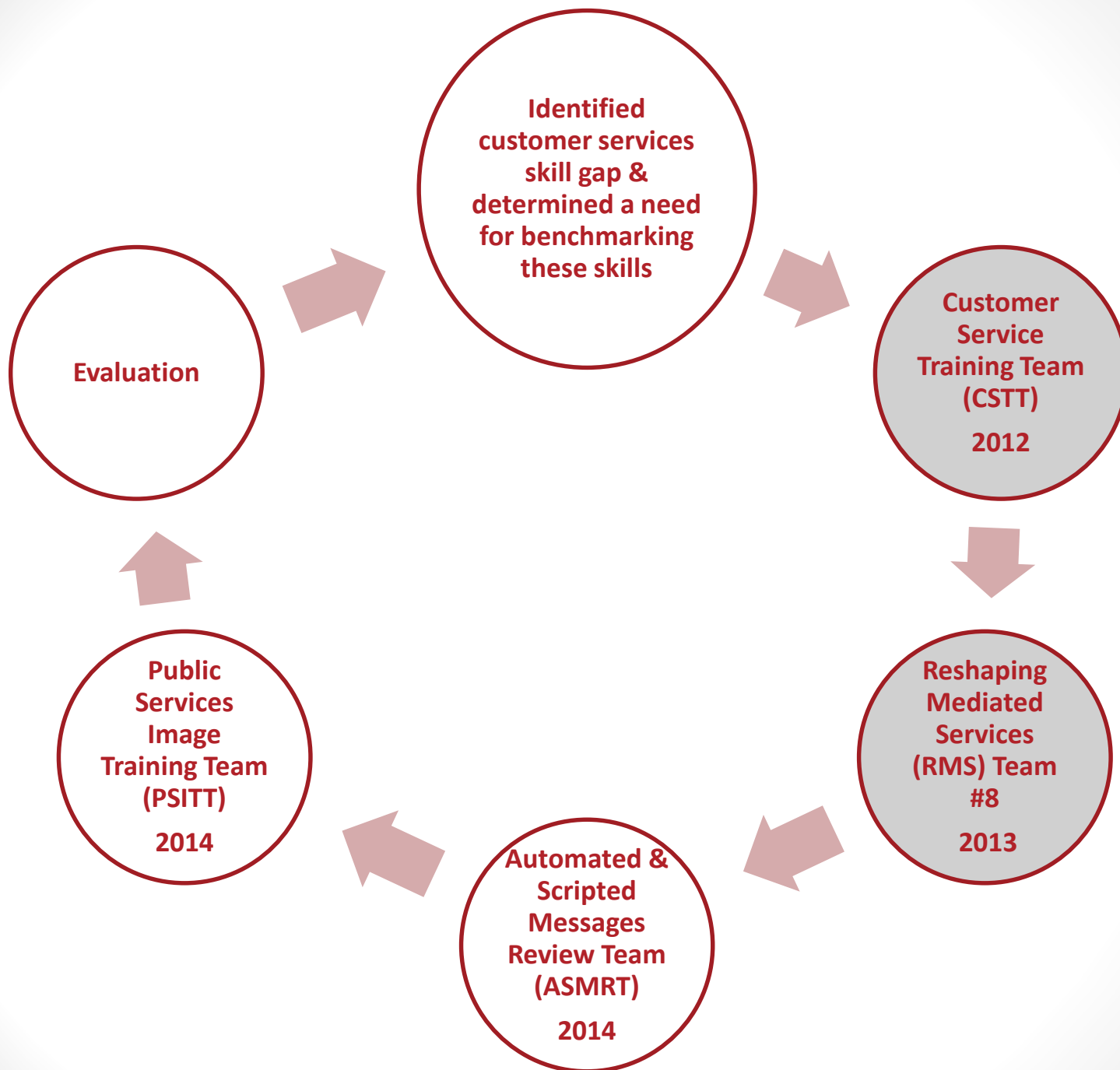
Who we serve

At MIT, we have ~11,000 students:

- 40% undergraduate, 60% graduate
- ~3,600 international students representing 116 countries
- 46 majors and 49 minors
- Interdisciplinary research across departments and schools

We also serve:

- 1,800 faculty
- 3,750 researchers across disciplines
- Staff across departments
- Partner institutions
- Non-MIT communities



ID&LA's Customer Service Training Team



Photo credit: L. Barry Hetherington

Reshaping Mediated Services #8



Photo credit: L. Barry Hetherington



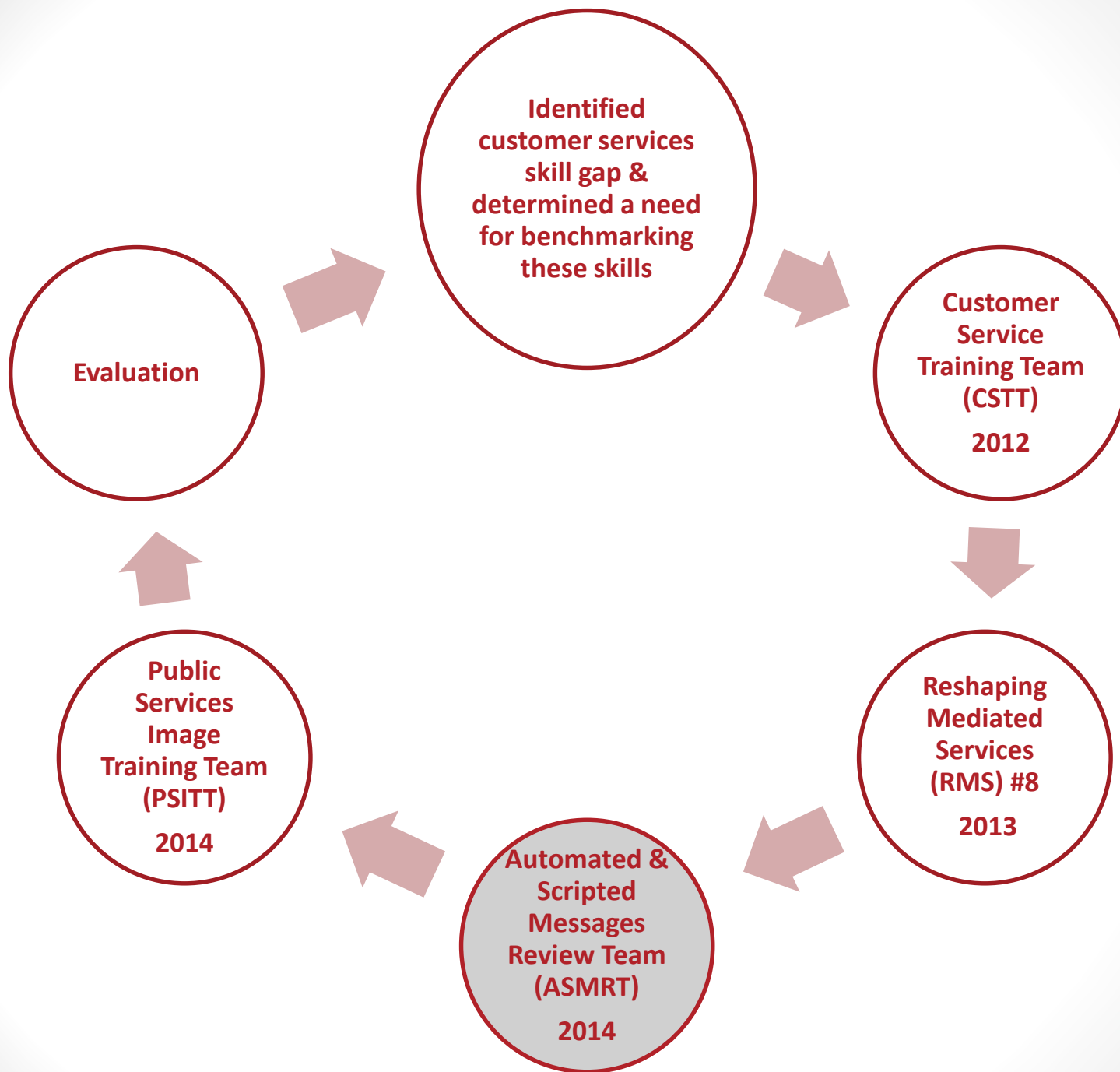
Our Service Philosophy

No matter where a user starts, he or she should have a great experience.

The services and staff of the MIT Libraries always seek to meet users' needs in a timely way.

We value personal connections with users.

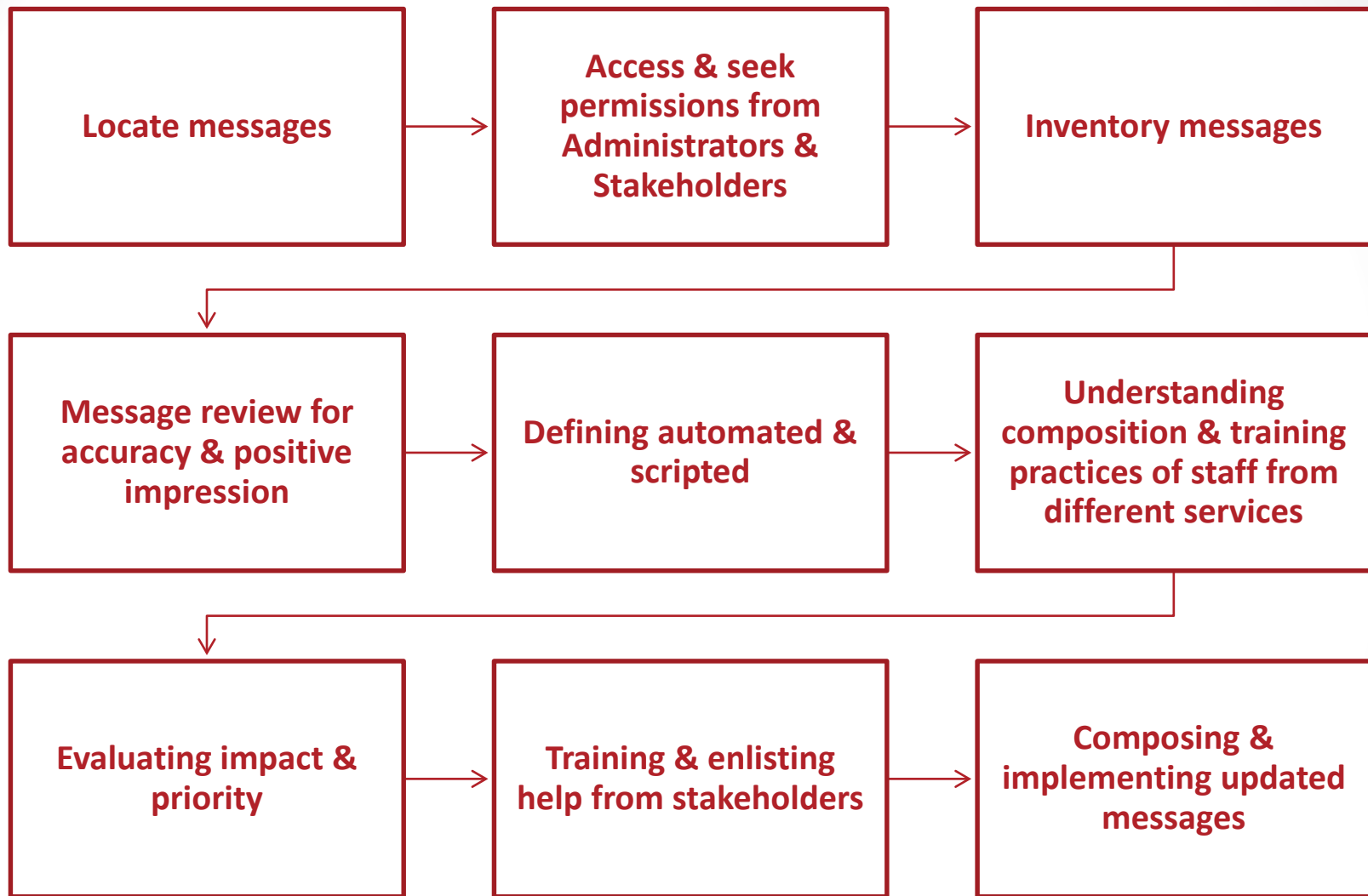
Beyond value to the user, each service transaction is important because it provides an opportunity to broaden and deepen engagement with the MIT community.





Automated & Scripted Messages Review Team (ASMRT)

- Review scripted & automated messages for:
 - Circulation notices (courtesy, fine, holds, etc.)
 - Ask ILB and ILB Requests
 - Research Consultations
 - Circulation RT
 - Ask Us
- Recommend changes & work w/ stakeholders to implement
- Create best practices for customer service messages
- Develop sustainable review process for messages
- Members from Access Services, formerly Resource Sharing, Liaison, Instruction & Reference, and User Experience





Message Types

- **AUTOMATED**
 - Automatically triggered and sent without staff intervention
 - Comprised of ~ 10% of total messages inventoried
- **SCRIPTED**
 - Built by staff using pre-defined scripts/templates & manually sent
 - More than 200 scripted messages
- **MIXED**
 - Uses multiple pre-defined scripts and/or custom messages
 - Majority of total messages fell into this category



Best Practices

**Professional
and human in
every
interaction**

**Keep goals and
actions clear**

**Friendly,
efficient,
knowledgeable,
approachable,
engaged, and
thorough**

**Keep lines of
communication
open**

**Aware that it's
easier to convey
approachability
and engagement
in-person than
via email**

**Soften language
when delivering
“bad” news**

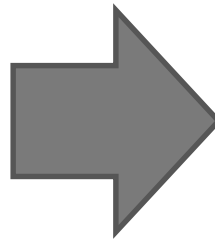
**Format text for
clarity**

**Try to end with a
positive (i.e.,
path to
resource)**



Patron claimed return, but item isn't found after search:

“We will continue to search for the book throughout the MIT Libraries, however in almost all cases where the item does not appear on the first search, it is never found, except when the patron discovers they had the book after all.”



“We will continue to look for the item throughout the MIT Libraries. In case the item isn't found when we look again, we ask that you please double-check your home, office, car, or any other place it may have been overlooked.”



Challenges & Solutions

Saying “no” all the time

Using Best Practices to deliver news

Lack of human tone and personalization

Empowering and training staff

Unwieldy documentation and/or templates

Archiving , deleting , or organizing messages

Losing or not sharing messages

Centralizing information

Unknown origins or date of last update

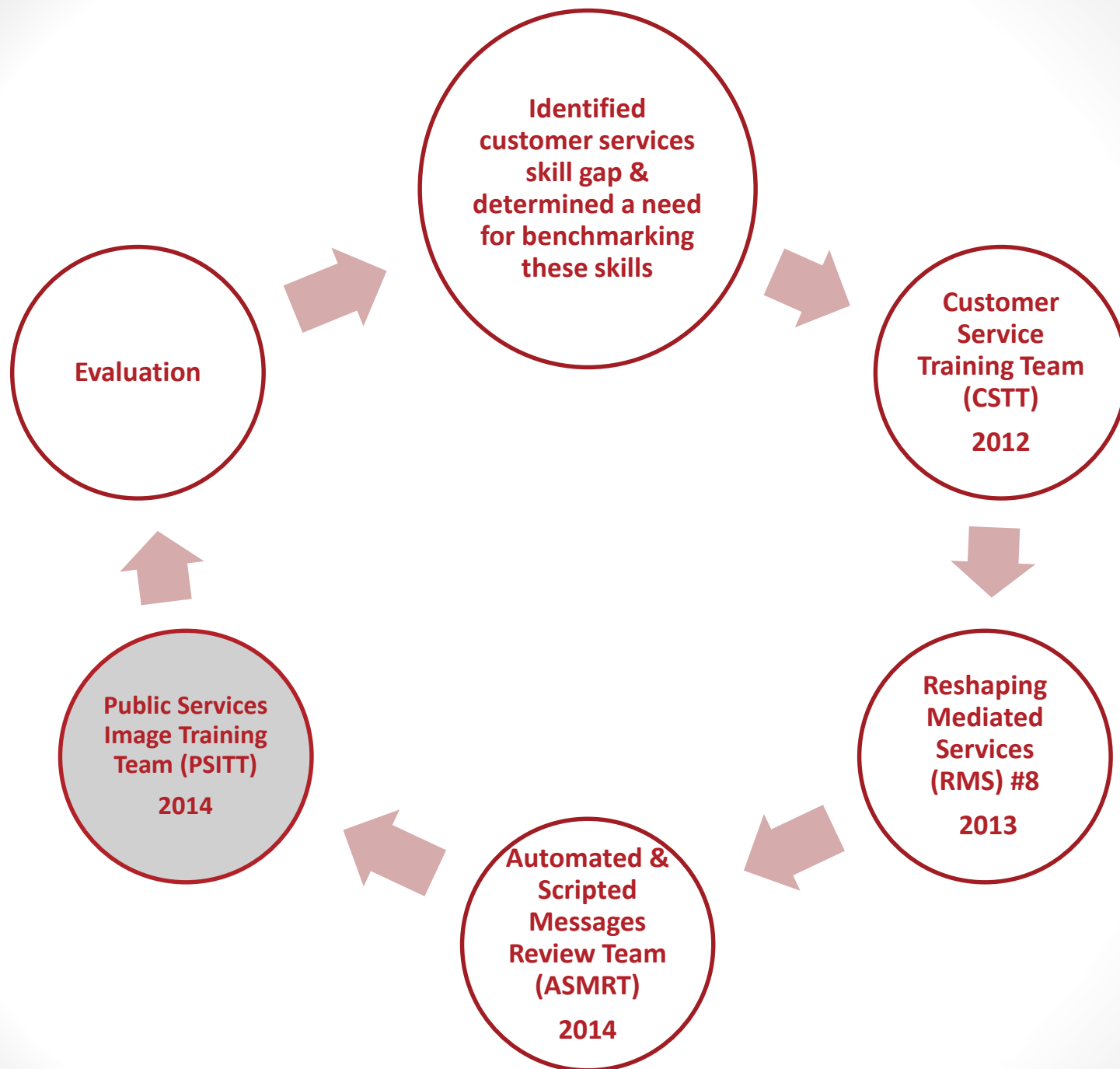
Systematic annual review process by each service

Inaccurate policy

Scheduled policy reviews

Time spent writing individual complicated replies

Identifying new messages for scripts/templates




Delivering great customer service





Positive Service Image Training Team (PSITT)

- Tied to Service Philosophy
 - Purpose: “To reinforce and build skills and knowledge for all mediated services staff about how to create a positive service image as well as in key customer service skills needed to serve a diverse community in an ever changing environment.”
- Who goes
 - Mandatory for all staff servicing in-person, chat, email, teaching, consultations
 - Academic and Community Engagement directorate + opt-ins
- Worked with  [brightspotstrategy](#) to develop training



Deliverables	Original Timeline	Actual Time & Extras
<ul style="list-style-type: none">• Develop Scope• Identify possible consultants	6 months	9 months <ul style="list-style-type: none">• Also had to develop Request for Proposal (RFP)
<ul style="list-style-type: none">• Review RFP's• Interview potential consultants• Make recommendation	1 month	3 ½ months <ul style="list-style-type: none">• Revise expectations• Get updated quote• Final approval
	Decision made to delay the training until the following Spring	Due to: <ul style="list-style-type: none">• Semester commitments• Staffing priorities• Internal vendor approval process• Weather...
<ul style="list-style-type: none">• Develop training content	3 months	3 months <ul style="list-style-type: none">• Testing the training• Training the trainers
<ul style="list-style-type: none">• Implement training	3 months	4 months <ul style="list-style-type: none">• Complex scheduling
<ul style="list-style-type: none">• Estimated vs. Actual Time	13 months	<ul style="list-style-type: none">• 19 ½ + delay



Logistics

- Two Sessions
 - 3-4 hours each
 - 3-4 trainers for each session – leading and floating
 - Each session offered multiple times
 - Mixture of support & professional staff as trainers
- Content
 - Mixture of activities to increase engagement
 - Large group, small group, individual work, poster boards, post-its, role play, video clips, audio clip
- Prep work & assessment
 - Homework before each session
 - Pre & post workshop surveys

Pre-workshop activity

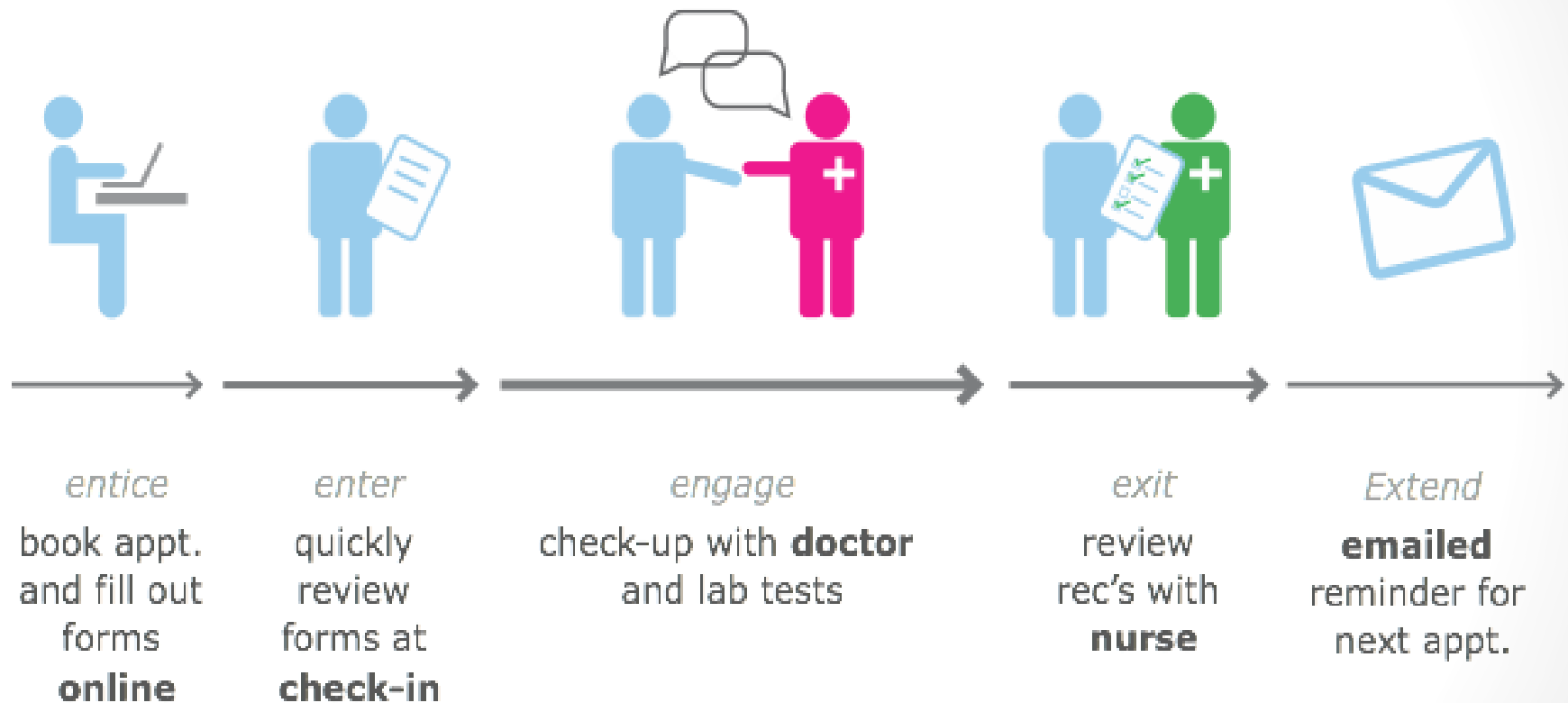


Image from brightspot, August 2015 / 5E's framework by Conifer Research

What is great service?

MIT Libraries | Great Service Experiences

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What is great service?

Reflecting on a personal experience where you were a user and interacted with a staff member (either in-person or online): (1) discuss what made for a great service experience in each "E" then (2) look across the S E's and distill some general principles for providing great service.

(1) What made for a positive or negative service experience?

	Positive	Negative
Entice	PIQUES INTEREST	TOO OBTRUSIVE
Enter	CLEAR DIRECTIONS EYE CONTACT	CONFUSION RE WHO TO ASK / UNAVAILABLE
Engage	TAKING PERSONAL INTEREST TO UNDERSTAND NEED	"I CAN'T HELP YOU"
Exit	AFFIRMATION NEED MET	NOT SCRIPTED
Extend	PERSONAL FOLLOW-UP REVEALING SPECIFIC UNDERSTANDING	FORMULA FOLLOW-UP ONLINE SURVEY THAT APPEARS TO BE END IN ITSELF

(2) Looking across the E's, what might be some guiding principles for providing great service?
e.g.: Acknowledge users when they enter.

NON-FORMULAIC

ASSESSMENT OF
NEEDS AND
LEARNING STYLE

ENGAGED/PERSONAL
(SMILE)



Role-playing

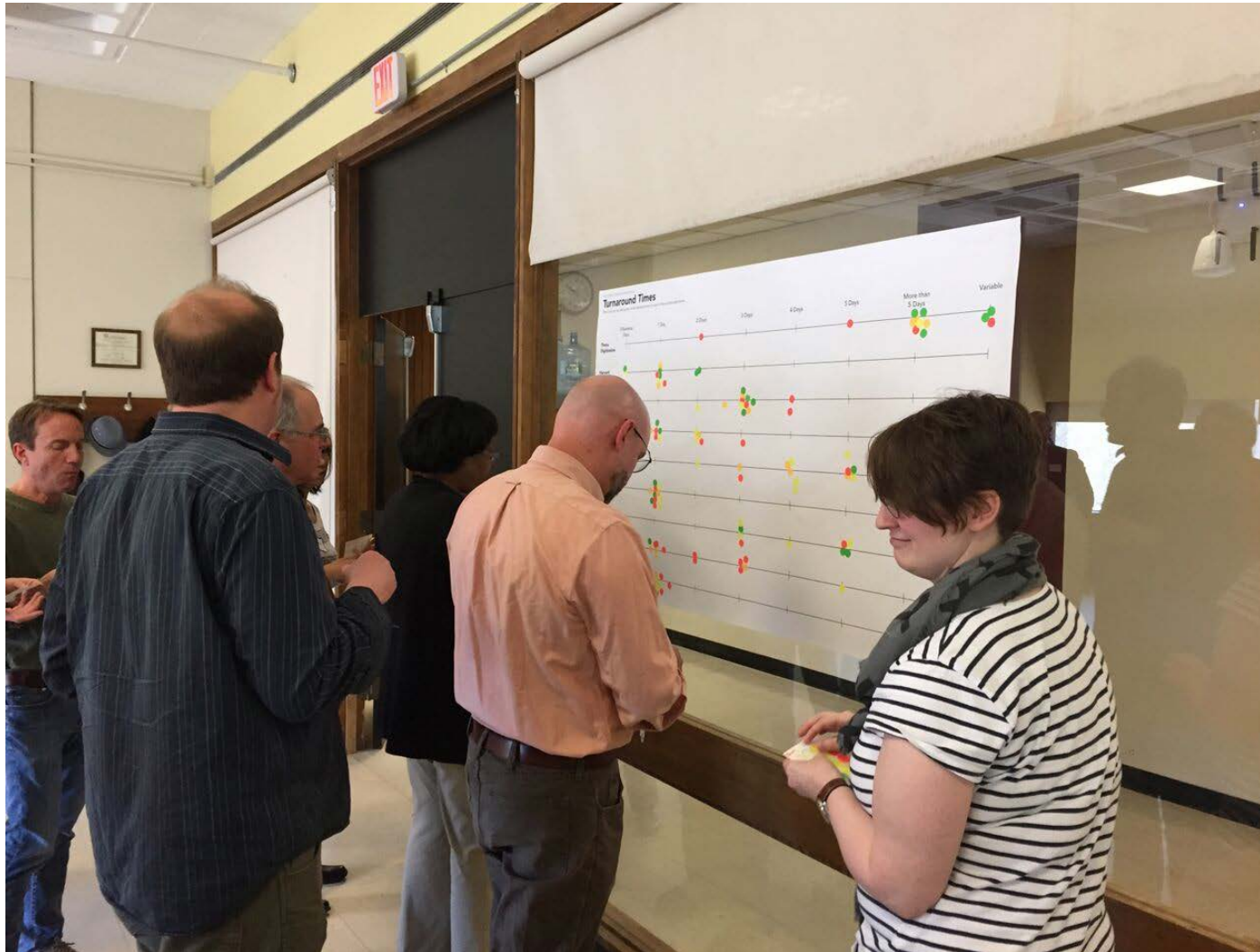
Scenario:

A graduate student would like to check out a book, but has found that it's already checked out. S/he wants to know who has checked it out.

Your challenge is to explain that borrowing records are confidential to protect all users and show them how to request what they want through BD, BLC or ILB.

From brightspot training, February 2015

Turnaround times activity





The Service Philosophy

Message	Personal Actions
We know information and we know MIT.	
We have the services, content, and expertise to meet the needs of individuals and MIT as a whole.	
We are here to support our users and maximize the productivity of our community.	





Challenges

**Scheduling
trainings
around
90+ staff**

Buy-In

**Working
with an
outside
vendor**

**Finding
space/
rooms for
training**

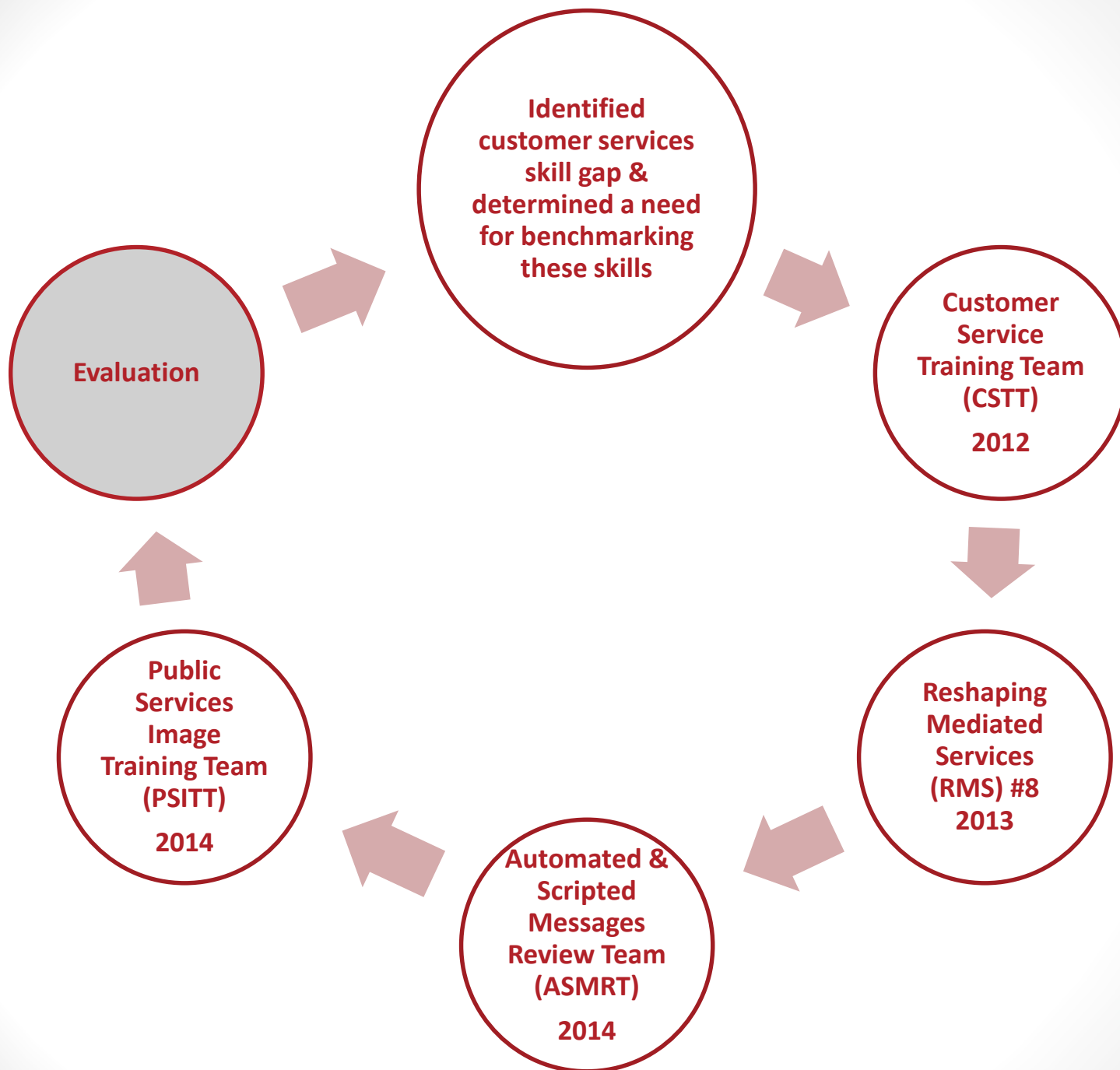
**Budget
constraints**

**Developing
curriculum
to address
diverse
needs**

**Staff time
investment**

Opt-In

**Competing
priorities**





Keys to our success

- Support
 - Must have solid support from administration and supervisors
- Time
 - Large time investment by staff who are on the teams
- Teams
 - Mixture of staff from all levels and areas of the organization is important
- Carry it forward
 - This cannot be a one-time only training or review of messages. Build it into the organizational culture and value the work it takes to do these tasks.





Participant feedback

- Confidence Levels
 - Higher in “engagement in a positive manner” and in “defusing an incident by referring or taking other action”
 - Less so in “referrals outside of their purview”
- General Comments
 - Sessions were engaging
 - Liked the new instruction methods we used
 - Staff liked meeting colleagues outside of their departments
 - Some questioned the relevancy to their own work
- Future Desires
 - Brown bags & other opportunities to practice what was learned
 - More training on referrals & conflict resolution
- Logistical feedback
 - Sessions were too long
 - More food
 - Define the audience and continue to make it mandatory



Overall Impressions

**Opportunity to
share**

**Humbled by
scope of work
we all do**

**Need for
documentation**

**Training must be
repeated**

**Staff enjoyed
talking to new
people??**

**More
understanding of
others work**

**Inconsistent
practices/policies
discovered**

RMS Projects

- #3 Referrals (new Quick Referral Form)
- #4 Synchronous Help (2nd round of beta chat service)
- #5 Making Help More Contextual (recommendations shared to reach virtual users by embedding links to expertise)
- #6 Learn More About Untracked Interactions (results from desk study)
- #7 Increase Self-Service (re-casing DVDs, behind the desk collections, including reserves)
- #9 Reduce Barriers to Collections (60 day loans, auto-renew)